

Affirmation of the Trade Performance between Islands as Shield of Indonesia Confront MEA

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Abstract

Indonesia is a maritime country with many unutilize resources but high in experiences in the world trade pass through ocean. However, in this era, the ocean and the fishery sector of Indonesia confront the new challenge called Asian Economy Society (MEA). The Policy of accelerating the Ocean and the fishery industrialization is one of the strategic step to face MEA. It must be synergistic with the increase of the trade performance between islands. The increase of the trade performance between islands could be done by constructing new harbor through the approachment of "Tol Laut" and the change of consumer behavior. It will affect in : (1) The increase of market share in the ocean and the fishery comodity in Global Market ; (2) The Acceleration of the Ocean and the fishery industrialization ; (3) The increase of value of the ocean and the fishery comodity ; (4) The increase of The state's income ; (5) The increase of fhiserman and fish farmer prosperity ; (6) The Defense of The Unity of the Republic of Indonesia.

Key Word : MEA, trade between Islands, performance, Industrialization

INTRODUCTION

Indonesia is a maritime country with many unutilize resources and has many experiences in the world trade pass through ocean (Anshory dan Arbaningsih, 2008; Wolters, 2011; Caro, 2012). Therefore, this is the appropriate time for Indonesia to conduct reorientation of the paradigm of development. The reorientation consist of two of the fundamental thing. The first, the reorientation focus in the construction from the basis of the landing resources to the basis of the ocean resources. The second, that puIDRose of the ocean construction should be not only to pursue but also to create the economy development, to distribute the prosperity (social equity), and to maintain the resources, the coastal area quality and the ocean in balance (Dahuri, 2003).

The reorientation of the paradigm of the construction idea is not only base on

potential, oportunity, problem, costraint, and condition of the ocean construction but also consider on influence of the strategic area of the national constraction such as the globalisation and the regional autonomy. This sector has high potential, strategic, and high competitiveness in the international trade. If the potency of the big fishery and ocean of Indonesia is managed carefully such as other sector (food plant, estate, and forestry), the national economy will increase more than the value of economy development in the other countries in the South East Asia (Asia Tenggara).

Indonesia has sea zone as long as 5.8 million km ($\pm 70\%$ of total of territorial zone). The broad of the sea is registered that the length of beach side is ± 81.000 km with the potential of the cultivation in the ocean zone for fish as long as $\pm 3.124.747$ ha (Nurjana, 1997; Kamaluddin, 2002). According to the

data, it is indicated that Indonesia has the potency of ocean resources that is bigger than the neighbor country such as Philipphine, Thailand, or Vietnam. Sadly, the production capacity and the export value of fishery from the neighbor countries is bigger than that in Indonesia.

The export value outcome from the fishery increases every year, for example in 2013 the export value increased as many as 14.26 % whereas in 2012 increased as many as 8.25 %. Although, the import value of the fishery increased from 10.88 % in 2012 to 12.62 % in 2013 (PDSI, 2014). An effort to decrease import could be done by applying the Acceleration of the Ocean and the fishery industrialization. One of industry, which is necessary founded, is manufacturer of fish flour – the import value increase every year. In addition, in this era, product from fish such as dried fish and anchovies, which is made by fisherman and farmer fish, confront competitor from Japan, England, Singapore, Hongkong, Thailand, Vietnam and Myanmar.

The Acceleration of the Ocean and the fishery industrialization become necessary to decrease import, increase acceptance country, and elevate the fisherman and the fish farmer prosperity. However, the industrialization will not success without the increase of the trade performance of islands. It is necessary to do as an effort to outcome fish distribution, therefore the shortage of fishery product in a region is not supplied from another country. In addition, the increase of the trade capability between islands must be increased to maximize domestic market because 40 % ASEAN market is located in Indonesia. Therefore, it is necessary to increase the infrastructure of ocean transportation (Kamaluddin, 2002). One of the primary supports of the maritime economy is from the oceanic

transportation aspects. The ocean transportation is important because it will accelerate the transaction of goods between islands, therefore it can stimulate the economy development in develop area. Thus, the increase of the trade capability between islands became necessary to Indonesia as a defense to confront MEA.

THE CONSTRUCTION OF OCEAN AND FISHERY

The Geographical location and the ocean resources, which are owned by Indonesia, confer acknowledgegment that Indonesia is the maritime country and the biggest archipelagic country in the World, with the width of the sea at 5.8 million km² or $\frac{3}{4}$ of the total of Indonesia's ocean and 17.506 island which is surrounded by ± 81.000 side of beach with a big potency of economy. This geographical condition is supported by the fact that Indonesia is in the important geopolitical position that it is located between the Pacific Ocean and the Hindia Ocean, the most dynamic area in the political strategy and the world safety. This is the basic reason to make the ocean development as the primary stream of the national development (Dahuri, 2003).

Fishery and ocean resources are one of the natural resources which is the assets of country and could give the valuable contribution to the prosperity of nation included Indonesia. As a maritime country, which is consisted of a thousands island and extends from Sabang to Merauke, Indonesia has the high potential of fishery and ocean resources and the second longest coastline after Couldada with 17.506 island and the width of the ocean at 5.8 million km², and the potential of fishery resources as many as 6.40 milion ton per year (Table 1). From the potential, total of haul is allowed as many as 5.12

million ton per year or 80 % of renewable potency.

The magnitude of the fishery resources potential in Indonesia could be argument to increase the national economy construction with fishery and ocean basis (Dahuri, 2003), the construction with fishery basis should could be became the primary direction of the national construction because the resources, which is owned by Indonesia, is rich but ineffectively used. Industry with the basis of fishery and ocean resources has very strong worries to another industry as well as the fishery and ocean resources data could be updated so that the comparative and competitive superiorty could be sustained in a long time.

Table 1. The Renewable Potency of Indonesia Fishery

No.	Waters	Total (ton/year)
1.	Malaka Channel	276.030
2.	South China Sea	1.057.050
3.	Java Sea	796.640
4.	Makassar Channel and Flores Sea	911.000
5.	Banda Sea	277.490
6.	Seram Sea and Tomini Gulf	590.620
7.	Sulawesi Sea and Pasific Ocean	621.720
8.	Arafuru Sea	771.550
9.	Hindia Ocean	1.076.890
Total		6.378.990

Source: BPS, 2001

Therefore, the fishery and ocean sector are developed as one of mainstay to the income of country in attempt to support the national development. If it is compared to another country, contribution of the fishery sector of Indonesia is still relatively low (Table 2).

Some countries such as China, the United States, South Korea, and Japan have economic contribution in the fishery and ocean sector toward the national PDB of more than 30 percents.

It is very contradictive if it is compared to the fishery and ocean sector in Indonesia. The very big fishery resources with its megabiodiversity only give contribution in a relatively small number. This is caused by the potential and rich of natural resources that have not been utilized well particularly in Indonesia Exclusive Economy Zone (ZEI). In addition, development of the fishery and ocean sector since the last 3 decades is always mentioned as the terminal sector in the national economy.

Table 2. Comparison of fish distribution in some countries

No.	Country	The length of beach (km)	The broad of waters (km ²)	The contribution of ocean sector toward GDP	
				%	Value
1.	United States	19.800	Unk.	32,00	\$ 14 Billion (1995)
2.	South Korea	2.713	Unk.	37,00	\$ 14,7 Billion (Huh and Lee, 1992)
3.	China	32.000	3 millions	48,40	\$ 17.353 Billion (1998)
4.	Indonesia	81.000	5,8 millions	20,06	IDR 189 Trillion (1998)
5.	Japan	34.386	Bd	54,00	\$ 21,4 Trillion (Itosu, 1992)

Source: Zulfainarni, 2003.

Unk: unknown data

To continuously implement the development of coastal area and small islands, the fishery and ocean ministry as a young institute, pass through its programs continue to strive the development of coastal area and small islands in various aspect. Development is not only focused on the fishery aspects, but also on developing economical activities in coastal area and small islands, increase ocean and fishery resources, supervise fishery and ocean resources from destruction and illegal exploitation, utilize valuable thing in under the sea, continuously manage coastal area resources, and rehabilitate the damaged ecosystems.

Government through the fishery and ocean ministry have established the policy of endeavoring the economy of the coastal society (PEMP) which is run based on the policy of ministry Number 41 of 2000 the Fishery and Ocean Ministry about General Orientation of Preparation of Small Islands

Continuously and Basis of Society. The puIDRose of endeavoring the economic of aspect the coastal society program is to increase prosperity of the coastal society through endeavoring economy of the society. The policy require a participation of society, because it will bring positive impact, can be understandable various problems and understand last decision which is taken. For that, in participation of the society need communication two directions continually and information about program, project, or policy which is conveyed with various technique not only pasive and formal but also active and informal (Hadi in Pical, 2003)

Some locations have different approaches. The approaches consist of repair area, coastal protection from erosion, investigation of coastal damaged area. Moreover, various pilot have been condided for constructing of the coastal village area in attemp to repair the area and keep the sanitation. In addition, cooperation is also developed with all parties among government, college, private, and society. Special for college, has founded Nautical Partner Program in effort to accelerate the affirmation of institutional and human resources in the region in constructing of the coastal area.

POTENTIAL AND PROBLEM OF THE OCEAN AND FISHERY SECTOR

The Potensial of Development

Indonesia is the biggest archipelagic country in the World because it has broad sea and the largest amber of islands. The coast line of Indonesia is 104.000 km with the width of sea area based on UNCLOS 1982 is 284.210,9 km² territorial zone, 2.981.211 km² ZEEI, dan 279.322 km² 12 mil of ocean. This potential make Indonesia as a country with high ocean resources such us the largest amber of biological

species and non biological of ocean (KKP 2015). Clasification of the potential generally consist of renewable resources such as fishery resources (capture fhisery and cultivation), mangrove, coral, plain, mineral of sea water and deep sea water, wave energy, withdraw, wind, and OTEC (Ocean Thermal Energy Conversion), and non renewable resources such as oil and gas of earth of resources and various mineral. Moreover, also there are various of ocean area service which could be developed for ocean construction such as nautical tourism, maritime industry, transportation service, ect (Kamaluddin, 2002; KKP, 2015).

The potential of development of the ocean and fishery sector consist of :

- a. Capture fishery on the sea is 6.5 million ton and on general waters as wide as 54 million hectare with the potential of production is 0.9 million ton per year.
- b. Cultivation of the sea as wide as wide as 8.3 million hectare consist of fish cultivation (20%), cockle cultivation (10%), seaweed cultivation (60%), and the other (10%)
- c. Potential of brackish water cultivation (embankment) as wide as 1.3 million hectare
- d. Insipid water cultivation consist of fishpond as wide as 526.40 thousands hectare, general waters (lake, reservoir, river, and swamp) as wide as 158.2 thousands hectare, wet rice field as wide as 1.55 million hectare.
- e. Biotechnology of the ocean to develod biotechnology of the ocean industry: industry of basic materials for food, industry of natural woof materials, fish and shrimp seed, and industry of non food such us health and cosmetic industry (Farmasetika laut).

Moreover, there are potency and development probability including 1) small islands development, 2) precious stuff of sinking ship utilization 3) deep sea water utilization 4) salt nation industry 5) sand water utilization 6) supporter industry 7) marine biodiversity

Besides the natural resource, other potentials are 1) institutional potential such as the role of Indonesian Tuna Commission, Indonesia Shrimp Commission, Fisheries Society of Nusantara, Association of Fisheries Business of Indonesia, All-Indonesia Fishermen's Association, Tuna Association of Indonesia, Indonesia Tuna Longline Association, Civil Society Organization of maritime and fisheries. 2). Tools and infrastructure potency. Technical implementing unit of district namely Fishing Port, cultivation center, Quality Testing Center of Marine and Fishery Processing, Litbang center, Fish Quarantine center, and fisheries high school.

The others important potency are cultivation of exportable commodities such as coconut and cashew which is usually done by fisherman and coastal communities. Beside the exporting commodities fisherman and coastal communities also cultivate crops like corn, dry rice, and vegetables. The coastal communities work export commodities and crops as a strategy to make up the income and to survive. Therefore, we need to accelerate the program and innovation in developing marine and fisheries supported by economic policy and the conducive socio-political climate. This action is intended to optimizing the utilization of marine resources and fisheries and make this sector as the primary motor of national economic development. As a consequence, coordination and support across sectors and other stakeholders become one of the crucial prerequisite.

Problems

Based on the great potential of marine and fisheries resources, the other challenge appeared is the rampant activities of Illegal Unreported and Unregulated (IUU) Fishing prejudice country and threaten the sustainability of marine and fisheries resources (CTF, 2014). Besides, there are problems that can be a strategic issue to be followed, they are:

1. The low productivity and marine and fishery competitiveness caused by structure is still dominated by small ships, upstream and downstream limited infrastructure.
2. Lack of business capital support from banking and other financial institutions.
3. Natural disasters; various damage, from mild to severe, wrecked the marine and fisheries' infrastructures, resident housing to fatalities that require better efforts mitigation.
4. The degradation of the aquatic environment; application of eco-friendly catching tools is still used, application of dynamite, the specific species have not been protected yet, overexploit of fish resources in fishery management area of the Republic of Indonesia.

ADVANCE THE PERFORMANCE OF INTER-ISLANDS TRADE

Market opportunity

FAO estimates the amount of world demand for fish and fishery products will raise close to 50 million tons, from 133 million tones in 1999/2001 to 183 million tones in 2015. The demand of seafood per capita annually is expected to go up from 16.1 kilograms in average in 1999 to 2001 to 18.4 kilograms in 2010 and 19.1 kilograms in 2015. As recorded, 70% of that is consumed for food. FAO also estimates that the world needs for fresh fish up to 45% every year. Unfortunately, from the amounts

mentioned above, Indonesian market is share just 3.57%. The level of domestic fish consumption is 37 kg/capita/year in 2014 have increased than in 2013 by 35 kg/capita / year, but lower than Japan and Malaysia, each at 60 -70 kg/capita/year and 50 -57 kg/capita/year. Unload volume of Inter-island trade have fluctuated every year, for example in 2011 as 238.9 million tons, an increase in 2012 to 312.6 million tons, and become lower in the year 2013, by 303.9 million tons (CBS, 2014). Related to the percentage of inter-islands trade, there is a huge imbalance between Java-Bali and Sumatra, Kalimantan, Sulawesi and Eastern part of Indonesia. This is due to the Sumatra, Kalimantan, Sulawesi and Eastern Indonesia that prioritize their economic activities to largest Java-Bali. The inter-islands unload value in 26 of Trade Representative Office (KPD) East Java, in 2012-2014 keep increasing. In 2012 it reached IDR 238.633 trillion in 2013 to IDR 275.605 trillion, and reached IDR 325.553 trillion in 2014. The inter-islands cargo activities in 2012 reached the value of IDR 301.488 trillion in 2013 to IDR 346.022 trillion, and in 2014, it reached IDR 415.876 trillion. The existence of KPD increase the potency of trade transactions in 2011 as IDR 463.35 trillion and increased to IDR 741.43 trillion 2014. It indicated that the average potential for inter-island trade transactions annually were growing at 15 percent (IDR 69.52 trillion) (CBS, 2015). The volume of trade inter-island in Southeast Sulawesi in 2014 is as much as to 5648 tons, with a value of inter-island trade of IDR 20.5 billion (CBS, 2015). This indicated that there are obstacle in Indonesia inter-regional linkages related to the equalization of development industrial sectors. Some of them are : (1) the regulation limited the flow of interregional goods and services ; (2) retribution and regional duty; (3)

lack of infrastructure of transportation ; and (4) limited in logistic support.

Conditions that obstruct the trade inter-island consists of: (1) internal and (2) external. Internal conditions consist of: (1) transport fee and high distribution; (2) Local regulation-laws that blocked the distribution (high economic fee) and the inter-island distribution performance; and (3) oligopoly market . External conditions consist of: (1) the high competitiveness between imported product-prices; supply management, the facilities from the exporting country - fund, transportation, quarantine, distribution, duty, etc. and (2) difficult prove dumping.

Strategies to solve the inter-island trade inhibiting factors include: (1) develop a competitive product market (salvage value of the product and minimize losses); (2) advocate the local market through the devotion and promotion of local products (by local product branding); (3) increasing the market opportunities of local products and market networking; (4) building strategic partnerships and up-down investments(networking); and (5) pursuing and certified organic products to supply new market share.

Strategy 1. Minimize the Losses

- a) Optimization of product distribution and utilization of storage technology (silo)
- b) Security of domestic market by up-down partnerships
- c) Salvage of product value by standardization and labeling product (by SNI)

Strategy 2. Devotion and Promotion of Local Products

Imported Product substitution through:

- a) Development of information and update marketing services.
- b) promoting the local products.
- c) Expanding the networking of products market

Strategy 3. Information Services and Market

- a) market information services by: Internet and SMS prices, price information boards, developing farmer market.
- b) Facilitate market for farmers by: the operationalization of the warehouse receipt, build up-down partnerships

Strategy 4. Networking

- a) Building networking by: regional marketing cooperation, International marketing cooperation.
- b) Implementing commodity auction.
- c) Creating a fair marketing , trade diplomacy, harmonization of trade rules.

Strategy 5. Certified Organic Products to Supply New Market Share

- a) Institutional reinforcement
- b) Control quality and standardized

Besides of the 5 strategies, others that require to be done are to face the AEC (ASEAN Economic Community) by SMILE (Synergy between elements, high work ethic, Network, Believe and Self Confidence, superior products, Positive Mindset)

Marine and Fisheries Sector Face MEA

Anticipating global trade competition in MEA 2015, especially in the marine and fisheries sector, the government is expected to keep improving various conductive strategy effort to save marine and fishery products in the domestic market from the threat of the entry of fisheries import products (other countries). Acceleration in the policy of marine and fisheries industrialization is a strategy to outcome the MEA. Implementation of the policy such as increasing the fishery additional value through diversification of products

will trigger acceleration of national fisheries production. The integration of the fisheries sector from upstream to downstream were based on the regional development and economic principles of blue with quality improvement programs, productivity and business efficiency. Therefore, it is necessary to keep implementing the marine and fisheries management system by market-oriented approach.

Reinforcement the Inter-Island Trading capability

Improving the capability of trade inter-island can be conducted by improving the quantity and quality of facilities and infrastructure of sea transportation. This is because of the number of ports during the years of 2012-2014 did not increased (Table 3). Increasing the number of sea transportation is very important to increase the volume and value of inter-islands trade, so that all community necessity related to the needs of fish and other fishery products can be supplied by fishermen, fish farmers, and the domestic industry.

Table 3. Number of Fishing Port in Indonesia According to Classes 2012-2014

No.	Class	Year		
		2012	2013	2014
1	fishing harbor ocean	6	6	6
2	fishing ports of the nusantara	14	15	15
3	fishing harbor beach	47	47	47
4	Fishing Landing Base	749	748	748
5	Private Fishing	2	2	2
Total		816	816	816

Source: PDSI, 2014

Improving the performance of inter-island trading done by the construction of a new port via TOL SEA approach. The approach improve:

1. Increasing and improving connectivity all of NKRI
2. Specialization marine and fishery commodities based on the region
3. Saturation of domestic market

4. Increasing market fragmentation

These efforts must be accompanied by change behavior of consumers to prioritize of the products and processed marine and fishery products from domestic. The success of the approach TOL SEA and supporter efforts would impact on:

1. Increase in market share of marine and fishery commodities in the global market,
2. Accelerating the industrialization of marine and fisheries.
3. Increasing the additional value of marine and fishery commodities,
4. Increasing state income,
5. Increasing the prosperity of fishermen and fish farmers, and
6. Defending the integrity of NKRI

CONCLUSION

The policy of accelerating of the marine and fisheries industrialization is one of the strategies to face MEA. It must be dovetailed with advance of inter-island trade performance . The conditions that blocked trade inter-island consists of: (1) internal and (2) external. Internal conditions consist of: (1) transport fee and high distribution; (2) Regional regulation-laws that blocked the distribution (high economic fee) and the inter-island distribution performance; and (3) oligopoly market . External conditions consist of: (1) the high competitiveness imported products-priced ; supply management, the facilities from the exporting country - fund, transportation, quarantine, distribution, duty, etc. and (2) difficult prove dumping.

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promotion of local products (by local product branding); (3) increasing the market opportunities of local products and market networking; (4) building strategic partnerships and up-down investments(networking); and (5) pursuing and certified organic products to supply new market share.

Increasing the performance of trade between the island can be done with the construction of a new port via TOL SEA approaches and changes in consumer's behavior. This will result in:

1. Increasing market share of marine and fishery commodities in the global market,
 2. Accelerating the industrialization of marine and fisheries.
 3. Increasing the additional value of marine and fishery commodities,
 4. Increasing state income,
 5. Increasing the prosperity of fishermen and fish farmers, and
 6. retention of integrity of the NKRI
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